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SEPTEMBER 25, 1967

Special Issue  
on Japan



# FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

A WEEKLY MAGAZINE OF THE UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE

# FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

SEPTEMBER 25, 1967

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Torii, or gates, seen all over Japan, have become a popular symbol of that country. In this issue, FOREIGN AGRICULTURE pays its respects to modern Japan and the century of development in trade with commerce that began with the Meiji Restoration in 1868.

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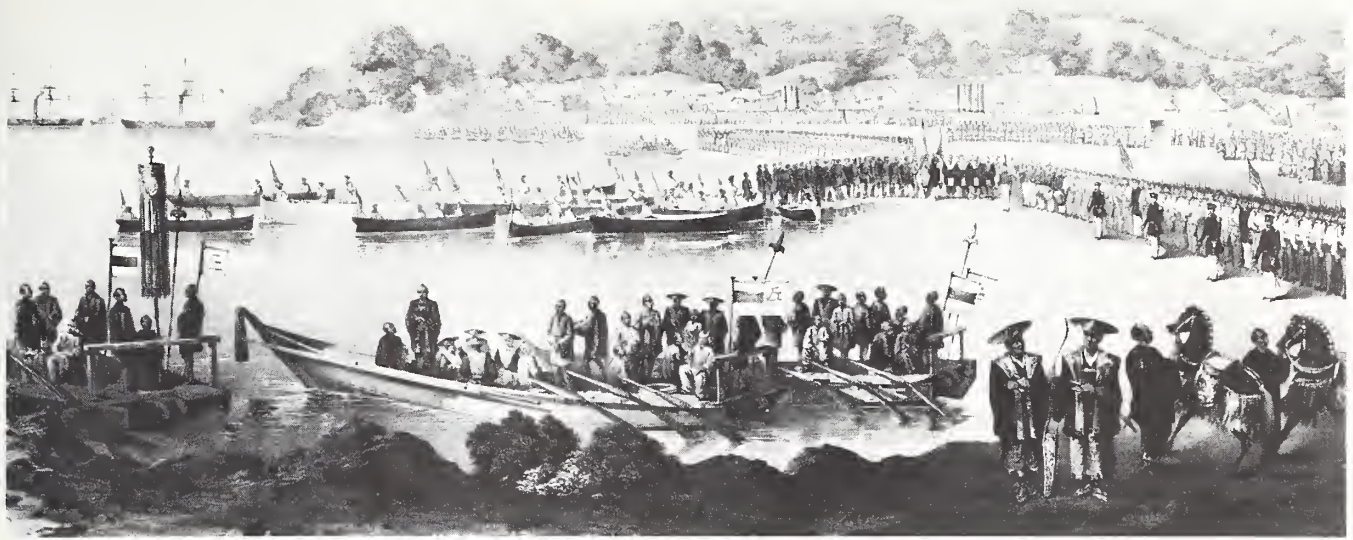
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First landing of Americans in Japan in 1853. Fifteen years later, trade with the West began its tremendous expansion.

# One Hundred Years of Japanese Agricultural Trade

*Hardly known to the Western world just a century ago, Japan has emerged as one of its biggest trading partners and U.S. agriculture's No. 1 foreign market.*

By MARY ELLEN LONG  
Foreign Regional Analysis Division  
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With the exception of the World War II years, Japan has been an important trading partner of the United States throughout the twentieth century. Today, this country is the United States largest market for agricultural products, buying an average of \$965 million worth or 32 percent of its total agricultural imports of \$3 billion in 1964-66. Some of the events leading to the development of Japan as U.S. agriculture's No. 1 foreign market follow.

The development of contact with the Western world after centuries of feudal domination by a minority ruling class spurred the collapse of Japan's feudal system in the mid-1900's and began its move toward an industrial economy. By 1868—onset of the Meiji period—the country was unified and the Emperor restored. The isolationist curtain that had surrounded the country was drawn; in a great expansion of trade with the West, Japan's foreign commerce more than doubled in 10 years.

Imports and exports during this early period were influenced by the agricultural orientation of the economy. Raw silk was the leading export, followed by tea, rice, copper, coal, fish, paper, and pottery and other handicrafts. From 1868 until 1893, raw silk accounted for more than 40 percent of total exports, and as late as 1930, it was still the chief source of both foreign exchange and rural income. Imports reflected not only a great demand for consumer goods, but also a curiosity about the West's manufacturing and processing industries. Among agricultural products, food items and textiles from Western farms and factories were in particularly strong demand.

Internal growth, territorial expansion, and foreign-trade development were outstanding characteristics of the economy from 1868 until 1938. By the eve of World War II, Japan ranked as an important industrialized nation. Although agricultural development was also emphasized, a doubling of the country's population from 35 million in 1872 to 70 million in 1937 made fewer farm products available for export and brought about a greater dependence upon imported foodstuffs and raw materials. Major agricultural imports prior to the war were rice, wheat and wheat flour, cotton, soybeans and other oilseeds, vegetable oils, coffee, sugar, and hides and skins. Principal exports of farm products included raw silks, silk textiles, cotton yarn and textiles, tea, dried vegetables, and wheat flour.

## Economy devastated by war

Japan emerged from World War II in economic ruin. Industrial output was down to about one-third the prewar level, and agricultural production declined about 40 percent. Because export markets were practically nonexistent, foreign trade was at almost a complete standstill.

Japan's amazing recovery from the war is all the more remarkable because of the numerous difficulties that had to be resolved. With the loss of overseas territories, about 6.6 million people had to be repatriated to the homeland. Agriculture had to be revamped, the economy rebuilt, and new foreign markets and sources of raw materials established. A land reform program was introduced, extending ownership privileges to more farmers. Given this program, \$2 billion in U.S. aid, a large and technically skilled labor force, and the favorable demand for manufactures generated by the Korean War, Japan spectacularly rebuilt its economy and foreign trade to prewar levels by 1952.



During the past 15 years, real growth in the economy has averaged about 10 percent annually despite recessions in 1954, 1957, 1961, and 1965. This economic strength has won for Japan its position as an important manufacturing nation, world trader, and market for agricultural commodities.

Population growth since 1956 has been at a much lower rate averaging slightly less than 1 percent annually. Nevertheless, an additional 1 million persons each year continue to put pressure on an already congested area about the size of California. This larger population, however, is eating better—2,424 calories per capita in 1965 against 2,214 in 1955—and demanding higher quality, nutritious foods.

### Demand outstrips domestic output

Domestic production of agricultural products has not kept pace with the demands of Japanese consumers. Although agriculture has received considerable attention, its development has been hindered to a great extent by environmental factors. Much of the terrain is mountainous, arable land is limited, and soils are generally poor. High yields have been obtained with some crops, particularly rice, but not without heavy fertilization and skilled technology on the part of farmers.

Farming costs are high both to the producer and to the government. To maintain minimum areas of cultivable land, the government has had to combat erosion with expensive reclamation programs. Production of such staple food items as rice, wheat, sugar, and milk is under heavy government price subsidy, while many farmers are shifting to the higher protein foods, like meat and dairy products, which are in growing demand.

In recent years, Japanese agriculture has been facing strong competition from the encroachment of industry into rural areas. Moreover, the agricultural labor force is declining steadily as rising standards of living and the growth of manufacturing industries lure more farmers to factories and cities.

Increased demand for some products, like fruits and vegetables, has been met largely through domestic production, but growing interest during the 1960's in fruits not



*Above, Japanese farmers harvest wheat. Production of this crop—under heavy government subsidy—has been declining, and millers are relying increasingly on imports.*

produced domestically—bananas, raisins, and pineapples—has resulted in larger imports. Since 1961, output of milk, pork, eggs, and poultry has risen steadily and sharply. Still, it continues to fall short of demand, and certain dairy products and meats are being imported in increasing amounts.

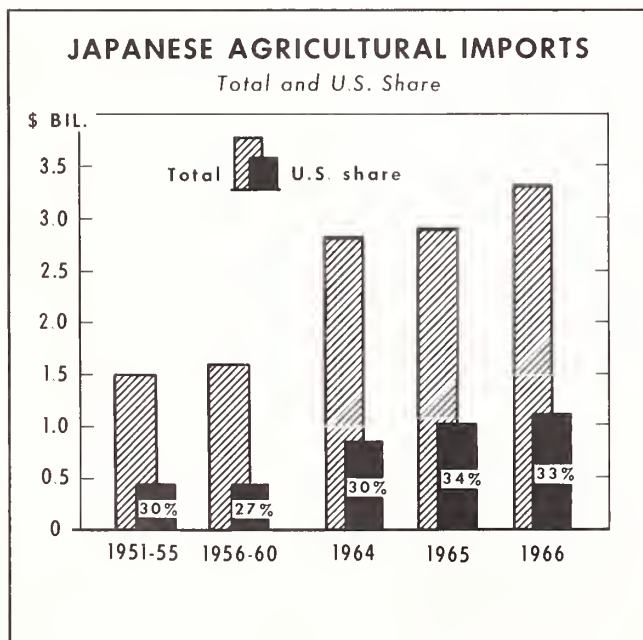
Some industries are highly dependent upon imported agricultural raw materials. This is particularly true of the textile and rubber industries, which rely solely on foreign cotton, wool, and crude rubber. Japan is a large consumer of sugar, and about 95 percent of the raw sugar requirements of its numerous processing plants is imported. As domestic wheat crops continue to decline, flour millers are relying to an increasing extent upon imported wheat. The tobacco industry depends upon imports of unmanufactured leaf. In recent years, emphasis on greater domestic production of livestock—chiefly poultry, dairy cattle, and hogs—has resulted in larger imports of feedgrains and breeding stock.

### United States takes one-third of market

Total imports of agricultural products more than doubled in value from \$1.5 billion to \$3.3 billion between 1951 and 1966. The U.S. share of this market has averaged about one-third and last year was valued at \$1.1 billion.

During the 1950's, 16 items accounted for approximately 90 percent of the total value of agricultural imports. The United States in most of these years was top supplier of eight: Nonfat dry milk, wheat, corn, tobacco, hides and skins, soybeans, cotton, and tallow. Since the 1950's Japan's imports have become more diversified, and the United States is now an important supplier of additional commodities. (See table on page 20.)

Japan's sources of imported agricultural products have also diversified in the years since 1951. The government's policy of negotiating bilateral trade agreements—which now number well over 40—has multiplied the number of suppliers of several staple foods and agricultural raw materials. Indications are that this trend will continue as Japan becomes a leader in assisting with the development of other Asian and Pacific areas.







*As Japanese consumers demand more high-protein foods like meat, both domestic production and imports are increasing. Clockwise from above, U.S. poultry is cut up and packed; women shop in food store's meat section; "Wagyu" cattle, native Japanese beef animals, grazing.*



The United States faces increasing competition from Canada, Australia, and possibly Argentina in supplying the Japanese wheat market. Mexico, El Salvador, India, and the Soviet Union are keen competitors in cotton. Larger shipments of nonfat dry milk are coming from New Zealand, Australia, Canada, and some of the Common Market countries. Thailand, Australia, and Indonesia have the potential to supply large quantities of grain sorghum.

On the export side, raw silk and mandarin oranges lead the list of Japan's agricultural sales abroad. Although textiles loom large in overall export trade, their share has declined in recent years in favor of small industrial items, chemicals, and heavy manufactures.

#### **Imports should continue upward**

A look into the future of Japan's farm trade points to larger imports as incomes rise and living standards improve. The outlook for domestic crop production is not encouraging. According to a recent long-range study on the status of agriculture in Japan, the farm labor force will decline to about 7 million by 1976. At the same time, wheat consumption will increase, although at a much lower rate than in recent years. Consumption of other foodgrains is expected to drop drastically, while intake of animal protein foods, chiefly milk and meat, is expected to more than double 1964 levels. Imports—and prospects for U.S. sales—will reflect to some extent this increased emphasis on high-protein foods.

Japan's overwhelming dependence upon foreign trade and the government's constant concern over the balance of payments situation are—and will continue to be—impor-

tant considerations in the country's import policy. For the most part, essential foods and agricultural raw materials are less restricted than other items in the application of import licensing and exchange controls. These commodities are not immune, however, to cutbacks or curtailment of imports if foreign exchange is in serious imbalance. In the past 12 years, serious imbalances occurred four times.

#### **Tariffs reduced, imports liberalized**

Tariffs have been established for most agricultural commodities, but the rates are generally nominal. State trading by the government, which applies particularly to imports of rice, wheat, barley, and tobacco, for all practical purposes nullifies the effect of tariffs. As a result of the Kennedy Round GATT negotiations, the Japanese Government has announced tariff reductions on a number of important U.S. exports to Japan, including soybeans, safflowerseed, animal feeds, tallow, lard, almonds, and prunes.

Prior to the Kennedy Round, Japan liberalized its import restrictions in 1964 in an effort to conform with requirements for membership in the International Monetary Fund and the Organization for Economic Cooperation and Development. Quantitative import quotas were substituted for exchange allocations. Liberalized commodities of interest to U.S. traders were grain sorghums, raw cotton, corn, soybeans, tallow, and hides and skins.

Imported commodities that are also produced in Japan continue to be subject to restriction by fund allocations. These commodities include wheat, wheat products, rice, barley, tobacco, citrus fruits (except lemons), dairy products, livestock for breeding, and processed foods.



*For the past four years Jimmy D. Minyard, author of this article, has been Assistant U.S. Agricultural Attaché, Tokyo. Here he distills observations of the Japanese food scene gathered during that time.*

## Sharp Old-New Contrasts Highlight Japan's Food Picture

Countless presentations on Japan in recent years—in books, magazine and newspaper articles, television programs, motion pictures—have depicted it as a nation torn between the old and the new, where modern machines and techniques are altering traditional patterns of living. All that is new is often summed up in the phrase “Western influence.”

Western influence is changing the Japanese food picture too. An understanding of the nature and extent of changes taking place in food consumption, distribution, and processing can be valuable intelligence to the U.S. food exporter who wants to begin or expand sales in Japan.

### Rice-fish diet on the wane

In no phase of Japanese life is the old-new contrast more striking than in food-consumption patterns.

Rice, the traditional basic staple remains the most important part of most Japanese meals, especially for the older generation. Older Japanese refuse to consider any meal complete without rice “to fill the gaps in the stomach.” For urban young married couples, however, rice is missing from the breakfast table. For them it's toast, hot tea or coffee, and often packaged breakfast cereals—rather than the traditional rice, pickled vegetables, cured fish, and miso (a soup made from processed soybeans).

Ask a fifth-grade class during lunch how many prefer bread to rice. At least two-thirds will choose bread. On reaching maturity, a good majority will still prefer it.

Age also makes a difference in preference for fish or meat. Almost all Japanese 40 and under would rather eat

meat. Older Japanese eat as much fish as the budget will allow, within reason, of course.

Children eat more today in Japan than they used to. Some are fat. Twice since World War II, Tokyo schools have had to put larger desks into elementary schools. Mothers try hard to get milk and other “necessary-for-health” foods into their young children's meals everyday. In addition, they include rice, since they themselves were nourished on rice and are relatively healthy.

Sales of kitchen equipment attest to the old-new food consumption picture. Small electric ovens are considered a “must” in modern urban households. But automatic rice cooker sales continue to boom. More than two-thirds of urban households have small refrigerators. Although much cooling space is devoted to beer and other beverages, meats, eggs, and vegetables are taking over a larger share of it. Toaster sales have been active in the last few years. But so have sales of tempura cookers; tempura is a traditional Japanese style of deep-fat frying.

Even into geisha restaurants, which are famous for preserving the old Japan, the new is slowly creeping. Here, where innumerable courses of traditional foods are beautifully prepared and served, a California lemon may decorate one of the fish courses, and a small steak or chicken leg may appear as another course.

The rate at which new foods are changing the oldtime rice-fish diet was indicated in a recent 10-year projection of food demand made by Japan's Ministry of Agriculture and Forestry, and summarized in the article on page 15. From 1967 through 1976 the demands for meat, milk,





eggs, wheat, and fresh green vegetables are expected to jump 50 to 200 percent. Rice consumption is expected to increase only slightly during the period. Demand for soybeans for food is also expected to rise only slightly; soybeans are the raw material for such traditional dishes as tofu, miso, and soy sauce.

#### Food distribution—more old than new

Contrasts between old and new are not so sharp in the food distribution pattern, although a modern system is developing slowly.

Slowing the transition from the old system to the new is the great number of Japanese whose livelihood depends on preservation of the old. Some 1.5 million persons work in Japan's 675,000 retail food and beverage outlets. Another 450,000 are employed by the nation's more than 50,000 wholesalers. Still another sizable segment of the Japanese work force is involved in transportation and storage of food and in restaurant operations.

Supermarkets are becoming more important as retail outlets, but the volume of a Japanese supermarket operation is still insignificant compared with business done by a large supermarket in the United States. And it is not unusual to find a supermarket surrounded by dozens of small "mama-papa" type specialized outlets. These—fish stores, beverages stores, fruit stores, vegetable stores, meat shops—abound in any neighborhood. In addition to adding a distinctive redolence to the atmosphere, these small stores serve as a social meeting ground for the housewives who shop daily or more often for food.

The housewife expects fresh produce daily in the fruit and vegetable stores, and it takes early morning work by thousands to uphold her expectation. Fruits and vegetables are sold to retailers almost exclusively at auction in large central markets. A visit to such a market during the early



*On opposite page, supermarket near Tokyo—  
an example of the "new" in food distribution.*

*On this page, examples of the "old." Clock-  
wise from top: Small meat retail shop;  
housewives patronizing a fruit and vegetable  
peddler; neighborhood fruit store; and a  
Tokyo fruit and vegetable wholesale market.*





morning auction can be a harrowing experience for an onlooker. Thousands of people and small, medium, large, and gigantic trucks and carts are going in every direction. But the work gets done.

Rice traditionally has been purchased from rice stores. The government, through a licensing system, has protected this method of distribution. Recently, however, some imported prepackaged long grain rice has appeared in supermarkets and the food sections of department stores. Recently, also, rice stores have added a new line to their shelves—packaged dog food. This is a natural development because Japanese dogs have always consumed a lot of leftover rice.

Until recently the wholesaler has been undisputed king of the food-distribution setup. If the food manufacturer could not get wholesalers to handle his products, he might just as well have closed up shop. Small cracks are now beginning to appear in this system. A few well-financed manufacturers—mostly producers of Western-type foods—have established their own delivery networks. A few of the major supermarkets are now allowed to buy produce directly at wholesaler auctions. Primary wholesalers now sell directly to selected retail outlets, but this practice is *not* sweeping the country. Cooperative supermarkets in rural areas buy a few commodities from cooperative production associations.

Layered wholesaling, small retail outlets, millions of workers—all add to retail prices. The Japanese Government, aware of the need to do something, has been studying the problem for years. Militant consumer organizations have played their part in keeping the problem before the government.

In June 1962, a committee to study the situation was established in the Prime Minister's Secretariat. The committee has made a number of recommendations, most of which if acted on would eliminate many jobs. Only a few changes resulting from the recommendations have been made to date. One of these has resulted in getting trial shipments of cold storage vegetables to major urban centers. Another change has been a more relaxed approach to the question of new supermarkets.

It will be many years before a streamlined efficient food distribution system replaces the present mixture, which is definitely more old than new.

### **Small plants dominate food processing**

In the area of food processing the traditional and the modern live side by side but not in complete harmony.

There are almost 100,000 manufacturers of food and related products in Japan—1 for each 1,000 people. Only some 50 of these have more than 1,000 employees; about 1,000 plants have more than 100 workers. Another 60,000 plants have from 1 to 3 employees. Most of the smaller plants use family labor almost exclusively.

There are 40,000 rice mills in Japan, 1 for each rice retailer; each retail outlet gets brown rice from the government and mills it in a small-scale operation. Some isolated instances of modernization are occurring in this area, where several retailers have organized to establish a jointly owned rice mill. Although joint operations are more economical, they have not yet created a noticeable downward trend in number of rice milling plants.

Generally, Western foods are processed in much larger operations than traditional foods, but there are exceptions. Soy sauce production, for example, is exceptionally mod-

ern. And, while tofu production is generally confined to small back-of-the-store facilities, the production of frozen tofu is often a large-scale operation.

In dealing with food processing the government is trapped between consumer demand for lower prices that come with more efficient production and the problem of what to do with the million or more people now involved in small, generally inefficient food-processing enterprises. Few people are interested in organizing themselves into early retirement.

Small-scale operators have been protected against imports of competitive products through a highly protective import quota system. Big food processors have been protected by prohibitions against foreign capital investment. But the consumer thus far has had no protection from resulting high prices.

Ripples are beginning to appear on the surface of the protected ponds of the food processors, however, as consumers are becoming more vocal. The average consumer doesn't care whether tofu is made by pressing fermented soybeans through a crude wooden handpress or a high-speed hydraulic metal press—as long as the price is right. The romance of homemade goodies is less appealing than the lower cost obtained by modern factories.

Bakeries are a case in point. Big bakeries are expanding rapidly in Japan. Most of the small shops are still operating, but pressure on them is mounting. Consumers may like the aroma of the neighborhood bakery, but if a modern bakery 25 miles away produces cheaper bread—they will buy the latter and dispense with the aroma.

### **Opportunities for U.S. exporters**

As Japanese demand more Western foods, there will be a growing demand for the products of U.S. farmers. But this market will not be handed to the United States. Exporters here must make strong efforts to sell their products. Other countries with similar exportable agricultural products are also eyeing Japan.

U.S. processed foods generally enter under import duties of 15 to 50 percent (probably averaging around 25 percent), then move through several hands before they reach the consumer. This system tends to wreck the competitive advantages for the U.S. product and hurts sales.

Direct sales by a U.S. exporter to a Japanese retailer are almost impossible. The exporter must sell to a trading firm, the trading firm sells to a wholesaler. Only then does the retailer enter the picture. This system adds to the cost, but it is the way things are done and is difficult to circumvent.

A food processor cannot expect to come into Japan and set up production without a Japanese partner—a partner who probably will insist on following traditional methods of distribution. Under this old system it is impossible to introduce a new product quickly.

But conditions are changing slowly. The voice of the consumer is beginning to be heard. As he talks louder, the government will listen more attentively. Trade restrictions will ease, and U.S. food processors will have a better chance to sell in Japan.

The old is fighting a delayed, but losing battle. As the older generation loudly bemoans the loss of respect for things "old and good," the middle-aged group is busily engaged in making money to buy modern living necessities. And the young adults and children are enjoying anything and everything new and Western.



# Study Reveals Differences in Japan's Rural and Urban Food Habits

The first report of a nationwide food consumption study, designed to define selected eating habits of Japanese families, has just been released by the Ministry of Agriculture and Forestry. Data for the study were supplied by 100,000 sample households located throughout every prefecture in Japan.

First of its type ever made in Japan, the study was carried out on the recommendation of the Food and Agriculture Organization of the United Nations. Households in the survey fell into four main categories—non-agricultural households in cities, nonagricultural households in rural villages, agricultural households in cities, and agricultural households in rural villages.

Some of the study findings—

- Rice is still the most important staple food in the diet by far—even though (as other studies show) consumption of wheat products continues to increase.

- The shift from rice to wheat products is much more pronounced in urban nonagricultural households than in rural agricultural households.

- Meat is cooked more frequently in nonagricultural households, both rural and urban, than in agricultural households. There is little difference between categories in rate of use of fish, which is used at about double the rate of meat.

- Regional differences in food consumption were considerable for some foods. For example, only 40 to 50 percent of the survey households in western Honshu prefectures prepared miso soup daily, compared with 70 to 90 percent of households in certain eastern and northern Honshu prefectures. Miso soup is a standard Japanese menu item prepared from a soybean paste.

For the country as a whole, 84.8 percent of the three-meals-a-day regarded as standard were eaten at home by the study households. Meals eaten away from home accounted for another 10.6 percent and meals omitted for 1.8 percent. The remainder—2.8 percent—were eaten on journeys lasting longer than overnight.

On the average, a Japanese eats a meal away from home once every three days. Lunch is the meal eaten out most often. Breakfast is the meal most often omitted. The number of meals eaten outside the home and the number of meals omitted are larger for cities than for rural villages. And within rural villages, they are larger for nonagricultural than for agricultural households.

## Staple food consumption

Rice is the staple food in 78.5 percent of all meals eaten in Japan, judging from the study. The percentage rises to 86.5 percent for meals eaten at home, plummets to 47.5 percent for meals eaten outside.

Rice-based meals are eaten at the highest rate for breakfast, and at only a slightly lower rate for dinner. For lunch, rice-style meals are eaten less often because many lunches are eaten outside the home.

Bread is eaten most frequently for lunch, especially for meals eaten outside the home and under the school lunch program. Bread is eaten next most frequently for breakfast, mostly at home.

Noodles are eaten most frequently for lunch, mainly by nonagricultural households. Noodles for dinner are eaten mainly by agricultural households.

Agricultural households surveyed had more meals based on rice (or a mixture of rice and barley or of barley cooked in place of rice) than nonagricultural households, and they cooked a large quantity of grain per person at each meal.

Specifically, agricultural households averaged 2.51 meals with rice at home each day, for which a little over 5 ounces of grain per capita per meal was cooked. Non-agricultural households averaged 2.1 meals with rice at home each day, for which about 4½ ounces per capita per meal was cooked.

## Other main foods

The study also measured trends in the consumption of three other basic foods—miso soup, meat, and fish.

According to survey data, 72.7 percent of all households in Japan prepare miso soup every day. Apparently it is often served to complement rice.

About one-sixth of all households in Japan cook fresh meat every day on the average. The rate is higher in cities than in rural villages and higher for nonagricultural than for agricultural households.

Almost one-third of all households cook fish every day. The rate was about the same for households in all categories. Looking at meat and fish together, it can be concluded that half the households in Japan eat one of the two every day.

—Based on Embassy dispatch, Tokyo,  
from JIMMY D. MINYARD

## Japanese Eating More Eggs and Broilers

In a report on Japan's rising consumption and production of poultry and poultry products, *The Japanese Economic Journal* of August 22, 1967, credited U.S. agribusiness firms with doing much to stimulate both. The paragraphs below are excerpted from the report.

"A recent survey by the Ministry of Agriculture and Forestry showed that national egg consumption reached more than 10 kilograms (about 187 eggs) per person in fiscal 1966.

"National chicken consumption has grown to the extent that there were an estimated 20,000 households engaged in producing broilers in 1966, aside from others supplying poultry meat. The Ministry's survey, covering the period from 1960 through 1966, showed that national production has doubled in the case of eggs and increased 3.2 times as to chickens.

"The impressive growth in Japan's consumption of poultry products and a corresponding development of their production and marketing methods have meant an unprecedented expansion of Japan's poultry industry and allied business lines. Major trading firms, food processing and even fishery companies as well as farm produce dealers are seeking bigger shares of the swelling market."

The report also acknowledged contributions of U.S. production know-how, which has been the major factor in expansion of the Japanese egg industry and development of the poultry meat industry. U.S. poultry meat products entering Japan have been mainly responsible for expanding the consumer market and developing new marketing and distribution channels for poultry meat.

# Promotion of U.S. Farm Products in Full Swing in Japan

By ELMER W. HALLOWELL  
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Tokyo

For more than a decade the Foreign Agricultural Service of the U.S. Department of Agriculture, in cooperation with a wide variety of U.S. agricultural trade associations, has been carrying on a highly successful cooperative program to expand sales of U.S. agricultural products in Japan. These sales reached nearly a billion dollars in 1966—all for cash—making Japan the United States No. 1 dollar market for U.S. agricultural products. In 1955, before the program began, sales totaled only \$386 million of which \$77 million were under Title I of P.L. 480.

The agricultural market development program was inaugurated in 1956 with programs for cotton, soybeans, tobacco, wheat, and inedible tallow. Added to the program since that time have been feedgrains, poultry, hides and skins, seeds, rice, fruits, vegetables, nuts, hops, and variety meats. Several are sponsored by organizations which were not in existence in 1956.

Hundreds of different market promotion activities have been undertaken during the last 11 years, under the sponsorship of 20 different U.S. cooperators—6 of which have offices in Tokyo—and some 75 Japanese trade organizations which work with them in cooperative activities. Some programs have been outstanding successes in terms of increased sales, and practically all have led to increased market promotion by the related Japanese industries.

This is truly a cooperative program, one in which U.S. trade associations and third-party Japanese cooperators provide leadership and funds to match contributions provided by the U.S. Department of Agriculture. The wheat market development program, for instance, is being carried out by Western Wheat Associates, USA, Inc., in cooperation with the Foreign Agricultural Service of the U.S. Department of Agriculture and some 20 Japanese wheat trade associations. Wheat Associates, with offices in Tokyo, is supported by wheat farmers and related groups in all of the important U.S. wheat producing areas.

At the beginning of the program, government funds were generated by P.L. 480 sales to Japan. At that time, Japan was still working its way out of its postwar problems and lacked the foreign exchange it needed for some of its agricultural imports from the United States. In more recent years the program has been financed with yen converted from local currencies of other countries which have P.L. 480 agreements with the United States. The campaigns for a few major U.S. commodities selling in Japan will be discussed here.

## Promotion for cotton and soybeans

The first contract for market promotion was signed in November 1955 between the Japan Cotton Spinners Association and the National Cotton Council of America. The Council in turn contracted with the Japanese Cotton Promotion Institute, consisting of six Japanese cotton trade associations, to administer the program in Japan. Under the project a wide variety of nationwide promotional campaigns has been launched via radio, television, motion pictures, newspapers, pamphlets, posters, etc. The promo-



*Tokyo's huge Isetan Department Store held a 9-day promotion in March for American foods. The Isetan salesgirl, above, is helping a Japanese housewife to American prunes.*

tion agency staged cotton fabric design and quality contests; selected Cotton Queens; and set up "Cotton Weeks" in principal cities featuring retail promotion of high-style and casual apparel, household cottons, and decorator fabrics. American Maids of Cotton have also won friends and customers for American cotton during visits to Japan sponsored under the program.

In spite of intensified competition from manmade fabrics, cotton textile sales have increased as a result of all these activities, resulting in continued strong demand for U.S. raw cotton. The success of this and programs in other countries, combined with the obvious need to stress the merits of cotton as a means of maintaining its position in relation to synthetic fibers, has led to the formation of the International Cotton Institute. The Institute, which is financed by major cotton exporting countries including the United States, will sponsor a greatly enlarged market development program in Japan in future years.

The market promotion program for soybeans was initiated in April 1956 under the sponsorship of the American Soybean Association through the Japanese American Soybean Institute, its operating arm in Japan. Promotion of such traditional soybean products as shoyu (soya sauce), miso (paste), tofu (bean curd), and aburaage (fried curd), as well as of soybean oil and meal, have helped make Japan the leading foreign market for American soybeans—a market worth \$208 million in 1966. Major emphasis is now on promotion of oil, which has the greatest growth potential. Demand for oil in Japan, however, has lagged behind that for soybean meal, which has gained because of the rapidly growing swine and poultry industries.

The Japan Oilseed Processors Association is cooperating in a consumer promotion of vegetable oil which is making





*Kitchen bus, at left, brought vegetable oil cooking demonstrations to rural housewives. Below left, Japanese miss gives test squeeze to a frozen, California-grown turkey.*



extensive use of television and newspaper advertisements. The campaign symbol and slogan for soybean oil is also used by the oilseed crushers in their own brand advertising. A successful pilot promotion program for vegetable oil margarine has stimulated interest in a greater joint effort by the margarine industry.

### Campaigns for wheat, feedgrains, tallow

The wheat promotion program in Japan was launched in May 1956 by the Oregon Wheat Growers League. Western Wheat Associates, USA, Inc. has carried on a wheat market development program for most of the time since its inauguration. The Kitchen Bus Program carried on jointly with the Japan Nutrition Association has been one of the most successful programs carried on under this project. Buses were used to introduce balanced meals based on wheat foods, many of which were new to Japanese housewives, who customarily center their cooking around rice. The nutrition officials of the Ministry of Health and Welfare and other ministries have cooperated fully on this and similar programs aimed at improving the level of nutrition of the Japanese people.

In the late 1950's a school lunch demonstration project resulted in the extension of the School Lunch Program to about 1.5 million additional Japanese children, many of them in rural areas. Approximately 11 million children are now taking part.

Currently, a wide variety of activities is underway working through the National Food Life Improvement Association and some 15 different Japanese wheat processors and end-use industry associations. These organizations promote the use of wheat foods such as bread, macaroni, noodles, pastry and other confectionery items, and sandwiches by means of demonstrations, seminars, and various point-of-sale activities.

A program launched by the cooperator and USDA in 1960 introduced a new wheat to Japan, Hard Winter. The Japanese received needed technical and marketing assist-

ance from the United States to use the wheat, and efforts in this country reduced freight rates to make it possible for Hard Winter to move to the U.S. West Coast for shipment. Four years later Japan was buying nearly a million tons of Hard Winter annually. Basically the same procedure ushered in two more U.S. wheats—Hard Red Spring and Durum—in 1965. Japan also buys Western White, for a total of four major classes of U.S. wheat going to Japan.

Activities on behalf of American wheat have contributed importantly to more than doubling our sales of wheat to Japan and to making it the largest single dollar market in the world for U.S. wheat. Purchases this year again are expected to total over 2 million tons and account for more than 50 percent of Japan's total wheat imports.

A program to encourage sales of U.S. feedgrains to Japan was inaugurated in 1961 in cooperation with the U.S. Feed Grains Council. Since growth in feedgrain sales is dependent on changing the eating habits of the Japanese—and more particularly on increasing their consumption of animal protein—the program has emphasized promotion of such consumer end-products as pork, eggs, and chicken. Study trips by Japanese—both government and private—to the United States have assisted the technical development of the Japanese feed industry, as have seminars on feedmill management, distribution of publications on various phases of the industry, feed demonstrations, and trade fairs and exhibits. These projects have been carried on and financed jointly with the Japan Feed Manufacturers Association and other Japanese associations. With the boost of this program, sales of U.S. feedstuffs to Japan have staged the amazing growth indicated below:

### U.S. EXPORTS OF FEEDSTUFFS TO JAPAN

	Corn	Sorghum	Alfalfa	Total value <sup>1</sup>
Year	Million bushels	Million bushels	1,000 short tons	Mil. dol.
1955 .....	3.9	4.3	.....	11
1960 .....	7.0	2.3	37.4 <sup>2</sup>	15
1965 .....	95.0	56.8	274.7	234
1966 .....	83.6	83.9	294.8	256

<sup>1</sup> Includes barley for feed. <sup>2</sup> Fodders and feeds, NEC, vegetable origin. Alfalfa not separately classified in 1960.

Shipments of U.S. feedgrains to Japan in fiscal 1967 accounted for about 26 percent of all U.S. feedgrains exported to dollar markets. Six years ago the United States had 40 percent of the Japanese market with exports of 750,000 tons. Grain sorghum became the leading item in U.S. exports to Japan in fiscal 1967 with nearly 2.5 million tons; corn exports of 1.9 million and barley exports of 194,000 made up the balance.

The National Renderers Association has spearheaded an aggressive program to promote its products, particularly tallow, in the Japanese market since 1957. Nationwide advertising and promotion campaigns, which have been organized in cooperation with the All-Japan Soap Association, plus other promotion, have helped introduce tallow both as soap and a feed ingredient to the Japanese feed industry. More details about tallow promotion and sales in Japan are given in the article which appears on page 13 of this magazine.



## Promotion for poultry

Sales of American poultry products have been fostered under a project administered by the Institute of American Poultry Industries (IAP) since 1961. Educational work has been carried on with Japanese poultry importers, wholesalers, and retailers; and nationwide magazine and retail campaigns have introduced the Japanese housewives, restaurateurs, and hotel operators to high-quality, ready-to-cook American chicken and turkey. Demonstrations of how to prepare and serve chicken and turkey in restaurants and hotels have yielded particularly good results, and American poultry is being featured increasingly in first class restaurants and hotels.

The Institute cooperated with FAS in conducting a poultry promotion campaign in the U.S. Trade Center in September 1963. Poultry exports to Japan jumped sharply in the next few months. Exports increased from 0.7 million pounds in 1962 to an alltime high of 10 million pounds in 1966.

Future programs will stress retail sales promotions during American Poultry Weeks held in stores and restaurants in major metropolitan areas, as well as closer work with food editors of women's magazines and other media. Great opportunities are seen for increased sales of turkey to hotels and restaurants. The scarcity and high price of red meats provide an excellent opportunity for further expansion of sales of poultry to Japan, which already has become the United States third most important overseas poultry market.

Japan is an increasingly attractive outlet for a growing number of American fresh and processed fruits, despite a sharp increase in Japanese fruit production, most of which is being consumed domestically. With the help of cooperative market development projects on lemons, prunes, raisins, and dates and fruit promotions at the U.S. Trade Center in Tokyo, sales of all U.S. fruit products reached a record \$19 million in 1966.

Four California-based fruit trade associations have promotion programs underway, most administered by Tokyo-based advertising agencies.

California raisin sales have been stimulated by an imaginative program aimed at the baking industry, housewives, and the younger generation. "California Raisin Chan," a raisin-haloed cartoon character, comes to the rescue with "raisins packed full of iron and quick energy" in a colorful comic strip series aimed at getting Japanese children to eat raisins out of their hands. Testimonials by bakers, who have profited from introducing products containing raisins, have widened the industrial market for raisins. Ads in ladies' magazines and public relations work with home economic editors have resulted in increased raisin sales to Japanese housewives.

California lemons have been featured in television, magazine, and newspaper ads, at cooking demonstrations in supermarkets and department stores, and in meetings of Japanese ladies' organizations. Japanese imports of lemons have grown steadily since their liberalization from import controls in 1963; 1966 purchases reached \$5.8 million.

Promotion of California prunes has been carried out on a restricted basis, hampered by lack of supplies caused by two successive short crops. Efforts are being made to build a quality image for a product largely unknown to the Japanese and promise to pay good dividends in improved sales when supplies become larger in the years ahead.

California dates also are new to Japan. Small-scale efforts have been directed at interesting confectioners and bakers in the versatility of this high-quality product.

Sales of fresh grapefruit and oranges, fresh and canned pineapple, and other canned fruits are severely limited by import quotas. (The quotas are worldwide, and not aimed at the United States alone.) Demand is so great for the American product that prices average 2½-3 times those in the United States. Most of the difference represents inflated importer and distributor margins, since import duties typically are only 20-25 percent. In view of the nearly absolute freedom which is accorded Japanese imports into the United States, it does not seem unreasonable to hope for a gradual easing of these highly restrictive quotas now imposed by Japan on imports of fresh and processed fruits and other processed food products.

## Trade Center promotions make mileage

The Foreign Agricultural Service has sponsored 11 agricultural exhibits at the U.S. Trade Center in Tokyo during the last 3½ years—many of them in close cooperation with U.S. agricultural market development cooperator associations. The exhibits have featured processed foods, poultry, leather products, feedgrains, fruits, soybeans, seeds, and livestock.

The nature of a number of these shows precludes a judgment as to their immediate or even long-range sales impact. Followup correspondence with exhibitors makes it clear, however, that most consider their participation has been extremely worthwhile in terms of case sales and the strengthening and developing of contacts.

One of the most successful shows was the Poultry Exhibit held in September 1963. Over 4,300 Japanese businessmen visited this show, which featured exhibits by 24 American poultry firms. Over 1 million pounds of poultry were sold during the 10 days of the show—more than in the entire previous year. This exhibit is generally given credit as having been the impetus which boosted U.S. poultry exports to Japan to a value of \$3.3 million in 1966.

A number of general conditions have helped make the success of the market development program possible. These include a phenomenal increase in Japan's gross national product—\$100 billion in 1966, compared with \$22.9 billion in 1955—and in the personal income of Japanese consumers. Also, the limited size of Japan's agricultural base; the general recognition of the Japanese people of the need for a better diet; some tendency for the Japanese to use their increased income to try new and Western products; and rising urbanization, which has taken people off the land and increased the population involved in the monetary economy.

The program also has benefited in many ways from the sympathetic attitude of the Japanese Government, which recognizes the mutuality of interest in trade with the United States. This attitude has been helped by the fact that Japan's own production of most of the agricultural commodities involved is too small to satisfy the country's needs.

On the other hand, there are a number of factors which have had somewhat of a braking effect on agricultural exports to Japan. In addition to an ingrained preference for domestic products, which is particularly notable in the case of rice, there is a natural resistance to change on the part of some of the population. This resistance to change is slowing moves to improve the food distribution system,



generally recognized as being in need of modernization. There is also a fairly strong vein of protectionism reflected in quotas on many processed food products. These quotas and inefficiencies in distribution result in high prices for imported products which, in turn, severely limit the market. In addition, restrictions on importation of foreign capital have made it virtually impossible for American or other foreign food wholesalers or retailers to set up shop.

### **Impact on U.S.-Japanese relations**

Although the agricultural market development program is basically a hard-sell effort aimed at increasing U.S. cash exports of farm products to our most important market, the program has much wider implications.

Over the years, tens of thousands of Japanese businessmen and literally millions of Japanese school children and adults have become aware of the fact that the American people, acting through this market development program, are interested in their welfare as well as their pocketbooks. The fact that Japanese businessmen are, in many cases, more than matching the funds expended by the United States on this program is perhaps the best indication of the economic value they place on the program.

Intangible benefits flowing from the program are more difficult to measure, but the feeling of kinship between Japanese and American business people engaged in the same industry or trade in the same commodity should not be underestimated. American visitors to Japan are constantly impressed with the feeling of friendship which this people-to-people program has engendered. The program has resulted in an increasing number of visits by groups of Americans with agricultural interests in Japan and of Japanese business people to the United States. These groups always return to their own countries with a new

appreciation of the importance of the relationship between Japan and the United States.

Although the agricultural market development program has been highly successful, there is of course room for improvement. There must be a continuous effort to increase the level of professionalism in administering the projects, and new approaches must be attempted. There is need for greater coordination between the various market development programs, and the possibilities of joint promotions is promising in a number of instances. Steps have already been taken in this direction; for instance, the American Food Festivals held in six of the largest department stores in as many different Japanese cities, headed by Tokyo, in May and June this year. And the Food and Agriculture Show in Tokyo in April 1968 will provide a focal point for intensified promotion programs on a wide front.

The United States is not alone in attempting to reap the benefits of greater sales to this large, growing, and potentially more lucrative market. During the last year about 15 different foreign countries have promoted their food products in Japan.

The outlook for U.S. agricultural exports to Japan is extremely promising, assuming the continuation of our market development program, the maintenance of U.S. policies which make our high-quality products competitive in the Japanese market, and continued prosperity in Japan. Sales should continue to rise at a rapid rate, although perhaps not as sharply as in the last 4 years when they rose at an average of \$115 million per year. It is not too much to hope that by the mid-1970's Japan will purchase \$1.5 billion worth of American agricultural products—despite substantial increases in imports from competing suppliers of such items as feedgrains, cotton, wheat, and dairy and processed food products.

### **One cooperator's success story**

## **Renderers Score in Japan With Fat-in-Feed and Soap Campaigns**

By DEAN SPECHT

*Executive Director,*

*National Renderers Association, Inc.*

Japan for the past several years has been the major Asian market for U.S. renderer products. The country is, in fact, the largest single buyer in the world of American tallow and grease. Furthermore, the Japanese market is clearly destined to continue to expand as U.S. renderers increase their exports of fat and animal protein byproducts across the Pacific. USDA- and cooperator-sponsored market development programs are playing an important role in this success.

The National Renderers Association—in cooperation with the Foreign Agricultural Service and other trade groups—has actively promoted the Japan-Far East market for U.S. renderer products for some years. These co-operative programs promoting greater use of animal fats and proteins in Japan began officially in 1957, when the first NRA-FAS marketing contract for the area was signed. This initial contract provided for market surveys by NRA representatives which later on led to the first third-party agreement between the Association and the All-Japan Soap Association. The associations activated a joint promotional program for consumers and trade.

A fat-in-feed promotion program was initiated in Japan in 1962, and first steps were taken toward opening a Far East NRA office to serve this rapidly growing market. This led, in 1963, to a joint 2-year contract with the Japan Scientific Feed Association to conduct extensive feeding trials in the use of fat in feed. From this point, NRA has been very active in promoting the benefits of American tallow and other renderer products in Japanese soap manufacture and agricultural development. The Far East NRA office was operated in Tokyo in 1964; James Y. Iso is Director.

NRA's marketing effort in Japan is directed largely at the feed, soap, and chemical industries in a program which is broken down to a number of specific projects, with some overlap. Some 15 separate promotional programs were conducted by The National Renderers Association and cooperating agencies—including FAS and the All-Japan Soap Association—during the fiscal year ending July 1967. Practically all of these activities were carried out in Japan, although some were extended into other Far East marketing areas such as the Philippines, Korea, and Taiwan.

Basically, NRA strategy for promoting and developing Far East markets for U.S.-renderer products operates:

- To provide technical guidance and education to feed production, livestock raising, and the manufacturing of



Above, executives of National Renderers Association—including author, at right—make friends with Japanese children during wash-up campaign at schools. Poster, at right, promotes soap.

other products from tallow. Objectives here are to expand these industries' capabilities and knowledge in the use of renderer products, thereby creating a more favorable environment for increased production and sales.

- To emphasize the practical advantages of fat and other renderer products by promotional programs to the feed industry, by stepped-up consultation at feed mills, technical guidance, etc.

- To carry out programs aimed at consumers and users in the feed and tallow products industries to create greater recognition of these commodities' value in today's highly competitive economy.

- To cooperate with Japanese manufacturers using U.S. renderer products through sharing of costs and mutually working out problems of the market promotion programs.

- To facilitate the export-import details of tallow and animal protein trade between U.S. renderers and Japanese firms; to assure smooth and amicable trade relations and increasing exports of American renderer products.

- To provide to U.S. renderers authoritative marketing information to help facilitate export plans and activities.

Typical of the detailed effort expended in these various programs is the nationwide soap promotion campaign conducted in Japan in 1966. Sponsored by NRA-FAS and The All-Japan Soap Association, the program was carried out over a 4-month period with Japanese schools and rural areas—the primary targets. Basic theme of the promotion was "Clean Hands, Wash Up with Soap." A wholly institutional—or public service—approach was used, with no advertising of brandname products. The campaign received the full support of Japan's 38,000 elementary schools and endorsement by the government Ministries of Education, Health and Welfare, Agriculture, and International Trade.

Major media were used in this national education-promotion campaign. A series of instruction booklets was distributed to grade schools and health centers, and institutional telecasts were presented 4 times weekly over 41 television stations throughout Japan. Seventy thousand posters went to schools and health centers and some 38,000 phonograph records to grade schools, promoting the theme song "Wash Our Hands with Soap."

Buses and streetcars posted ads and 1,360 closed-circuit farm broadcasting stations carried a 7-minute recorded

soap promotional broadcast to approximately 4 million Japanese farmers. Thirteen tons of toilet soap went to 900 major elementary schools, and soap promotion pictorials appeared in children's newspapers and a series of commercial soap ads in magazines and newspapers.

In 1966, similar detailed planning and followthrough in another direction resulted in the beneficial revision of import duties previously levied against incoming fat and inedible tallow. NRA negotiations with the Japanese Government supported by the Japan Feed Manufacturers Association obtained official recognition of tallow as a feed ingredient, with no import duty applicable.

#### Increases in tallow imports

The effectiveness of the promotional efforts of NRA, FAS, and Japanese organizations may be measured by the amount of inedible fats imported by Japan since 1964. The amount has increased by \$5,940,000, 8.4 percent overall, with virtually all of the increase in U.S. tallow. Japan's tallow imports rose to a total of 224,120 tons in 1966—an

JAPAN'S BEEF TALLOW IMPORTS			
Country	1964	1965	1966
	<i>Metric tons</i>	<i>Metric tons</i>	<i>Metric tons</i>
United States .....	163,333	171,333	197,013
Canada .....	9,904	11,888	8,710
Hong Kong .....	1	6	.....
Australia .....	11,164	4,035	10,161
New Zealand .....	7,822	3,651	8,215
Ryukus .....	.....	.....	21
Total .....	192,224	190,913	224,120
	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
U.S. share of total .....	84.9	89.7	87.9

increase of 33,207 tons over 1965. The U.S. share was 197,013 tons, or almost 88 percent.

The Asian market for U.S. fats and animal proteins is expected to remain consistently strong. Fat usage particularly in Japan, is expected to increase in the feed and chemical industries especially. The United States produces over 70 percent of the world's animal fats moving in world trade and in Asia is looked upon as the primary source of supply. While the emphasis on expanded fat usage will continue, animal protein products (meat and bone meal, and feathermeal) are also expected to gain increased favor in the feed industry.



# Big Gain Seen for Japan's Food Needs Over Next Decade

By JAMES C. FRINK

Assistant U.S. Agricultural Attaché, Tokyo

Japan's demand for agricultural products will continue to outstrip production over the next decade, according to a report by the Ministry of Agriculture and Forestry.<sup>1</sup>

The resulting rise in import needs will include a doubling of feedgrain imports, a 50-percent rise in soybeans and wheat, and sharp gains in overseas purchases of many other farm products.

## Changes in consumption

By 1976, total calories consumed per capita are expected to average slightly over 2,600 per day, compared with around 2,400 at the present and 2,200 a decade ago.

Past trends, however, indicate that the major changes will not be in volume of food consumed but in eating habits. From 1955 to 1964, consumption of starchy foods (rice, potatoes) dropped from 75 percent of the total diet to 65 percent, while intake of animal products and fruits and vegetables rose sharply; reflecting this turnabout, consumption of milk and other dairy products, meat, and eggs gained 210, 180, and 150 percent, respectively. During this same period, consumers ate less and less barley as food but more wheat as their liking for bread continued to grow.

The rise in personal income is considered the primary factor behind these changing requirements. Personal expenditures for consumption increased an average of 7.4 percent annually during 1955-64, with lower income groups showing the greatest gain; the tightening labor supply has aided these groups in getting larger year-to-year increases in income.

Increased city populations and urbanization of rural life (farmers working in cities) also are behind the consumption changes. Improvement in supply and distribution systems and broadened knowledge of nutrition, too, have contributed.

On the assumption that these trends will continue, the Ministry predicted that total consumption of meat, milk, soybeans, and fruits will more than double by 1976. The intake of green vegetables, eggs, sugar, and fats and oils is expected to increase more than 50 percent. Although consumption of wheat and barley is expected to increase over 40 percent while requirements for rice climb only 8

percent, rice will still continue to be in popular demand with total volume requirements about double those for wheat. During this 10-year period, population is expected to climb 10 percent to about 109 million.

## Projections of domestic demand

In the report, the 1976 per capita requirement for each commodity was developed by using past relationships between expenditures and consumption of the commodities. The projected population increase, of course, was included. It was assumed that individual expenditures for consumption would continue the 7-8 percent yearly rise recorded since 1955. For items unresponsive to income-level changes, past trends were utilized.

## Projected production and imports

Japan's total agricultural production is expected to increase at an annual rate of 2.9 percent between now and 1976. Declines in wheat and soybean production are to be more than offset by sharp increases in production of broilers, milk, and pork; these are to increase at average annual rates of 9.8, 9.6, and 8.9 percent, respectively. (No

### JAPANESE AGRICULTURAL REQUIREMENTS

Item	1964	1976	Percentage change
	1,000 metric tons	1,000 metric tons	
Rice .....	13,361	14,384	+ 8
Wheat .....	4,505	6,417	+ 42
Barley .....	1,718	2,599	+ 51
Sweetpotatoes .....	5,875	5,026	- 15
Potatoes .....	3,914	4,775	+ 22
Soybeans .....	1,889	3,799	+101
Green vegetables .....	11,755	18,870	+ 61
Fruits .....	5,045	11,123	+121
Milk .....	3,850	10,630	+176
Meat .....	840	2,318	+171
Eggs .....	990	1,548	+ 56
Oils and fats .....	951	1,617	+ 70
Sugar .....	1,942	3,740	+ 79

NOTE: 1976 estimated on yearly increase of 8 percent in individual expenditures on foods.

### PROJECTION OF JAPAN'S AGRICULTURAL REQUIREMENTS, PRODUCTION, AND IMPORT NEEDS IN 1976<sup>1</sup>

Commodity	Domestic		Import
	Demand	Production	requirements
	1,000 metric tons	1,000 metric tons	1,000 metric tons
Wheat .....	6,417	865	5,814
Soybeans .....	3,799	147	3,652
Concentrated feeds <sup>2</sup> .....	18,290	5,234	13,056
Barley .....	2,599	943	1,656
Fruits .....	11,123	8,663	2,460
Milk .....	10,630	9,029	1,601
Meat .....	2,318	1,842	476
Eggs .....	1,548	1,496	52
Rice .....	14,384	13,952	432

<sup>1</sup>Assuming an 8-percent rise in per capita expenditures.

<sup>2</sup>Largely corn and grain sorghum. (Also includes some barley, soybean meal and wheat which, unfortunately, is included in other categories but cannot be isolated.)

### PER CAPITA PER DAY FOOD CONSUMPTION BY CERTAIN CATEGORIES

Item	1955	1958	1961	1964
	Calories	Calories	Calories	Calories
Starchy food .....	1,599.5	1,561.5	1,526.6	1,498.0
Animal food .....	123.2	135.6	170.5	220.5
Fruits & vegetables ....	86.1	90.9	105.6	114.5
Others .....	336.0	364.4	420.4	485.9
Total .....	2,144.8	2,152.4	2,223.1	2,318.9
	Grams	Grams	Grams	Grams
Animal protein .....	14.2	13.7	17.2	21.8
Vegetable protein .....	54.0	53.0	52.2	51.8
Total .....	68.2	66.7	69.4	73.6
Total fats .....	26.9	30.0	36.5	44.0

<sup>1</sup>Long-Range Outlook for Demand, Supply, and Production of Agricultural Commodities in Japan, released November 1966 by Ministry of Agriculture and Forestry.

projections were included in the report for cotton and tobacco, which are considered "industrial" commodities not under the jurisdiction of the Ministry of Agriculture and Forestry.)

There are, however, many factors serving to retard farm production in Japan. In this crowded country, land has been steadily diverted from agricultural production to nonagricultural activities, and its use for two crops instead of just one has been declining. Moreover, the country continues to be plagued by youth moving to industrial jobs and leaving farming to elderly people, women, and children and by the increasing proportion of part-time farmers whose productivity is lower.

To overcome these problems, the government has undertaken many projects and contemplates many more. Among them are efforts to enlarge the scale of cultivation, to

intensify production, to expand mechanization, to develop and use regional specialized production centers, and to improve production techniques.

Whether these agricultural improvements will be enough to offset the negative factors appears questionable. Total land in cultivation in 1976 is projected to be the same as in 1964, with rate of utilization also about the same—125 percent. Currently, however, both are declining slightly, and it is doubtful that either trend will be reversed enough for projections in the report to be realized. In addition, the projection perhaps too optimistically refers to many broad modifications which are expected to bring about expanded yields.

It is therefore our view that Japan's import requirements for some commodities may be somewhat greater by 1976 than those set forth in the report.

## Japan's Feedgrain Needs Still Rising To Meet Growing Demands

Japan's total feedgrain requirements for 1967-68 are estimated at about 8.3 million metric tons, 3.3 percent above the 1966-67 level and a dramatic 54-percent increase over that of fiscal 1964. While domestic production of feedgrains continues to trend downward, demand for mixed feeds by the growing livestock and poultry industries holds strong. Imports of feedgrains during 1967-68 are estimated at 7.5 million metric tons—7 million for animal feed—a jump of 64 percent in the last 4 years.

U.S. exports of feedgrains to Japan are expected to increase slightly in the current fiscal year, with corn leveling off, sorghum showing a gain, and barley holding even. In 1966-67, U.S. exports totaled somewhat over 4.6 million metric tons or approximately 65 percent of Japan's total feedgrain imports. The U.S. share of the market was valued at an estimated \$236 million, about 26 percent of U.S. feedgrain exports to all dollar markets. Only 7 years ago, the United States exported just 530,000 tons of feedgrains to Japan for 30 percent of the Japanese market.

### Corn imports rise slightly

Japan's total imports of corn in 1967-68 are expected to rise to about 4 million metric tons from 3.8 million in 1966-67. U.S. corn—leader among U.S. feedgrains exported to Japan until 1966-67—faces increased competition from corn produced in Thailand, Mexico, South Africa, Mainland China, and a group of smaller countries. In 1966-67, the U.S. share of Japan's corn imports fell to 55 percent from 65 percent the previous year. The outlook is for leveling off of corn imports from the United States at about the 2-million-ton level.

Domestic consumption of corn continues to increase and is expected to reach 4.05 million metric tons during 1967-68, an increase of about 3.1 percent from that of a year earlier. Use of corn in feeds is forecast at 3.4 million tons, compared with 3.25 million in 1966-67. In the past few years, the mix ratio of corn in mixed feeds has trended downward from 40 percent in 1964 to 35 percent in 1965 and 32.5 percent in 1966. Corn has lost ground to grain sorghum because of favorable prices for the latter. However, the trend may change this year because the price gap between the more expensive corn and less expensive grain sorghum has narrowed recently.

Japan's imports of grain sorghum are projected to in-

crease to about 2.8 million tons in 1967-68 from 2.6 million last year. Last year's imports were 800,000 tons over those of the previous year and almost four times higher than 1963-64 imports despite the narrowing of the corn-sorghum price spread. The increase seems to show that Japanese feed producers are beginning to recognize that grain sorghum can be substituted directly for corn in livestock rations.

In the current fiscal year, the United States is expected to supply about 90 percent or 2.5 million metric tons of Japan's total sorghum imports since Argentine supplies are reduced. Last year, grain sorghum replaced corn as the leading item among U.S. feedgrain exports to Japan. Exports totaled 2.3 million metric tons, up 600,000 from those of the previous year. However, the U.S. share of Japan's sorghum market declined to 88 percent from 94 percent in 1965-66 as increased quantities were imported from Argentina, Mexico, and Australia.

### Sorghum use increases

Use of grain sorghum in animal feeds is expected to increase to almost 2.8 million metric tons during 1967-68, compared with approximately 2.6 million tons used during the previous year.

Japanese imports of barley from the United States are expected to hold even at about 270,000 metric tons, assuming adequate supplies at competitive prices. Use of barley is increasing both in feeds and in the manufacture of beer.

Imports of wheat bran in 1967-68 are expected to decrease to 200,000 metric tons. In 1966-67, imports were an estimated 326,658 tons, a decline of 11.8 percent from those of the previous year because the government ceased imports in late 1966 when the original import budget allocation was expended. The U.S. share of the market in 1966-67 was 18 percent, compared with 16.5 percent a year earlier. Argentina was the largest supplier, although its share of the market fell sharply to 24.5 percent from 50 percent.

Japan's growing consumption of feeds has meant bigger sales for U.S. producers of alfalfa, as well as of feedgrains. In the past 3 years, U.S. exports of alfalfa to Japan have nearly doubled. Exports of 300,000 metric tons in calendar year 1967 will earn nearly \$13 million in foreign exchange.



# Signup Deadline Near for Participation in Tokyo '68 Exhibition

In just over 6 months the doors will open on the most colorful and potentially the most valuable promotion of U.S. food and agricultural products ever staged overseas.

The event—the American Festival: Food, Fun, and Fashion. The time and place—April 5-21, 1968, in Tokyo, Japan, capital of U.S. agriculture's largest foreign market. Its precise location—Harumi Wharf in the heart of this largest city in the world.

Primarily an exhibition to stimulate sales, the American Festival will feature lively promotion exhibits of U.S. agricultural products. There will also be entertainment to bring in the crowds and create a festive air. Thousands of Japanese tradesmen and up to half a million of the Japanese public are expected to attend.

Firms that plan to take part in the exhibition have less than 3 weeks to sign up for it. Their completed participation agreements must be in the hands of the International Trade Fairs Division of USDA's Foreign Agricultural Service by October 15.

## Festival facts

The American Festival is being sponsored by Foreign Agricultural Service in cooperation with the Grocery Manufacturers of America, Inc., and other U.S. food and agricultural industry organizations. Invitations to participate have gone out to more than 2,000 business firms, as well as invitations to all 50 State governments to show their products in a special "Avenue of States." Advance interest indicates heavy participation by both groups.

Three sections of the exhibition will accommodate displays of individual companies. In a fourth—the Avenue of States—market-promotion agencies of individual States will furnish and man export product displays.

In the commercial booth section, U.S. food and agricultural firms and Japanese companies handling U.S. products can rent booths at which they can exhibit, sample, and sell their products to the public. Each company will provide staff for its exhibit.

In the "trade only" area—to which only accredited Japanese tradesmen will be admitted—companies may exhibit their products in a cabinet or freezer space, or both. Exhibitors in this area will provide a representative



*Design for Avenue of States, to be one display area at next year's Festival in Tokyo. States shown are not necessarily those that will be participants.*

to attend the display throughout the show.

Companies that exhibit in either the commercial or the "trade-only" sections may also display and sell their products to the public at a self-service grocery store—another Festival feature. In addition, U.S. firms not exhibiting elsewhere in the Festival and currently not selling in the Japanese market may market-test their products in this supermarket. An experienced Japanese firm will operate the supermarket at the Festival.

## Other fair attractions

- Crowd-drawing commodity booths featuring industry-wide displays of major U.S. farm exports to Japan. These include feedgrains, soybeans, wheat, poultry, rice, citrus fruits, raisins, prunes, peaches, fruit cocktail, livestock, leather, and plywood.
- A gourmet kitchen directed by a top American chef.
- Special areas highlighting favorite American snacks, entertainment, and livestock displays.
- Style show, with professional models displaying the latest in U.S. cotton, leather, and paper fashions.
- Two educational-entertainment specials—one portraying the benefits of two-way Japanese-American trade, the other dramatizing the story of American agriculture.
- Professional entertainment and

special daily features designed to attract crowds.

## U.S. Frozen Food Exhibit Premieres Today in Tokyo

The first trade show ever held in the Far East solely for the promotion of frozen foods opens today at the U.S. Trade Center in Tokyo, to run through October 6. At the event, an exhibit sponsored by the Foreign Agricultural Service, 24 U.S. frozen food firms are introducing their brand-name products to the Japanese trade.

In conjunction with the exhibit, a seminar covering various aspects of frozen food production, distribution, and use is being presented in Tokyo, Osaka, and Sapporo by a team of five experts from the United States.

Seminar topics are: "History and Development of the U.S. Frozen Food Industry;" "Latest Developments in Food Freezing Techniques;" "Merchandising Frozen Foods;" "Frozen Foods in Mass Feeding Operations;" and "Modern Living With Frozen Foods."

Seminar speakers are: Ralph Dulany, Dulany Foods, Inc.; Dr. Stephen Palmer, National Association of Frozen Food Packers; Ralph Lordi, Stop and Shop Supermarkets; Robert Hightower, Morrison Cafeterias; and Mrs. Helen Carlisle, McCormick and Company, Inc.

## Trade in Livestock Products Continues Higher Than in 1966

U.S. imports of red meats for the first 7 months of 1967 were 5 percent above those of the same period in 1966; the increase was due to a 14-percent increase in boneless beef imports. Pork imports have been at the same level as last year, while lamb imports were down 51 percent and wool down 43 percent from last year. Cattle imports, mainly feeder cattle, were down 31 percent.

### U.S. IMPORTS OF SELECTED LIVESTOCK PRODUCTS [Product-weight basis]

Commodity	July		Jan.-July	
	1966	1967	1966	1967
Red meats:				
Beef and veal:				
Fresh and frozen:	1,000	1,000	1,000	1,000
Bone-in beef:	pounds	pounds	pounds	pounds
Frozen .....	760	364	3,522	1,890
Fresh & chilled	1,249	442	10,184	1,957
Boneless beef .....	54,035	84,380	372,047	423,911
Cuts (prepared) ..	176	90	1,333	699
Veal .....	742	701	11,002	9,373
Canned beef:				
Corned .....		8,585		42,912
Other, incl.				
sausage .....	7,638	1,234	45,699	7,228
Prepared & preserved .....	3,015	2,591	15,614	20,165
Total beef & veal .....	67,615	98,387	459,401	508,135
Pork:				
Fresh & frozen .....	3,170	4,141	25,538	27,899
Canned:				
Hams & shoulders	14,316	17,692	122,948	125,282
Other .....	3,849	3,058	29,621	25,510
Cured:				
Hams & shoulders	138	144	881	888
Other .....	318	350	2,630	2,380
Sausage .....	167	166	1,207	1,615
Total pork .....	21,958	25,551	182,825	183,574
Mutton and goat .....	4,574	2,845	41,271	29,206
Lamb .....	1,210	890	11,335	5,585
Other sausage .....	479	424	3,362	3,735
Total red meat .....	95,836	128,097	698,194	730,235
Variety meats .....	195	144	2,270	1,678
Wool (clean basis):				
Dutiable .....	8,913	6,963	113,536	65,690
Duty free .....	12,464	6,907	68,586	39,038
Total wool .....	21,377	13,870	182,122	104,728
	1,000	1,000	1,000	1,000
Hides and skins:	pieces	pieces	pieces	pieces
Cattle .....	12	16	151	84
Calf .....	27	33	161	297
Kip .....	36	62	265	249
Buffalo .....	32	31	270	243
Sheep and lamb .....	2,128	1,930	19,144	13,691
Goat and kid .....	861	740	6,431	4,683
Horse .....	19	10	185	117
Pig .....	97	39	1,304	757
	Number	Number	Number	Number
Live cattle <sup>1</sup> .....	28,970	19,086	562,604	355,367

<sup>1</sup>Includes cattle for breeding.

Source: Bureau of the Census.

U.S. exports of livestock and livestock products thus far in 1967 continue to run ahead of those of a year earlier as

a result of increased slaughter supplies. Lard exports during the January-July 1967 period were 24 percent greater than those of the same period a year earlier. Tallow exports were up 21 percent for the same period. Increases were also registered for red meats, variety meats, and live cattle, up 12, 22, and 42 percent, respectively.

### U.S. EXPORTS OF LIVESTOCK PRODUCTS [Product-weight basis]

Commodity	July		Jan.-July	
	1966	1967	1966	1967
	1,000	1,000	1,000	1,000
Animal fats:	pounds	pounds	pounds	pounds
Lard .....	10,166	19,607	84,799	105,560
Tallow and greases:				
Inedible .....	168,276	215,189	1,145,068	1,369,448
Edible .....	1,203	334	8,045	11,985
Meats:				
Beef & veal .....	2,058	2,642	17,405	19,050
Pork .....	2,832	1,944	24,924	29,424
Lamb & mutton ..	222	82	1,030	851
Sausages:				
Except canned	167	214	1,150	1,253
Canned .....	85	92	794	687
Other canned meats	515	713	4,727	4,884
Meat specialties:				
Frozen .....	117	168	1,181	1,236
Canned .....	131	140	1,071	1,423
Total red meats	6,127	5,995	52,282	58,808
Variety meats .....	15,912	16,107	108,959	132,592
Sausage casings:				
Hog .....	538	654	3,851	3,581
Other natural ..	589	697	3,032	2,428
Mohair .....	1,472	274	5,677	5,714
Hides and skins:	Pounds	Pounds	Pounds	Pounds
Cattle parts .....		2,950		23,896
	1,000	1,000	1,000	1,000
	pieces	pieces	pieces	pieces
Cattle .....	971	735	8,018	7,553
Calf .....	141	157	1,265	1,208
Kip .....	55	18	338	258
Sheep and lamb ..	216	249	1,435	2,109
Horse .....	8	5	39	43
Goat and kid .....	52	60	250	186
	Number	Number	Number	Number
Live cattle .....	1,632	2,938	16,638	23,583

Source: Bureau of the Census.

## West Germany's Large Food and Feed Crops

West Germany has been harvesting exceptional grain crops and good crops of forage feeds this year. Generally favorable weather throughout the season has favored the good outturns. Good weather during grain harvest has kept to a minimum losses in both quantity and quality.

The West German September 1 official forecast of 1967 wheat production is a record 5.7 million metric tons, 26 percent above the 1966 crop and 10 percent above the 1964 record. Rye production is placed at 3.2 million tons, up 18 percent.

The West German barley crop is estimated at a record 4.7 million tons, 22 percent over last year's record. Oats production is placed at 2.7 million tons, up 15 percent.

Record per-acre yields for each of the grains accounted for the exceptional production.



The harvested areas of wheat at 3.5 million acres and of barley at 3.2 million acres were each only 2 percent larger than last year. Rye acreage was down 5 percent to 2.4 million acres, continuing a downtrend of many years. Oats acreage, at 2.0 million acres, was up 4 percent, showing an increase for two successive years after a long decline.

Low protein percentages are reported for brewing barley and wheat, a natural accompaniment of high per-acre yields. For brewing barley this provides a positive quality factor. For wheat, on the other hand, it means that imports of high protein wheat will likely be required to provide a good quality mix for milling purposes.

In other crops, potatoes show a good stand and outturn is expected to be at about the same level as the good 1966 crop. Approximately half of the total German potato crop is used for feed purposes. The feed beet crop is expected to be down slightly, but sugarbeets, which provide tops and processed byproducts for cattle feeding, are at about last year's level. Hay production is reportedly below last year, but of good quality.

## Canada's Flaxseed Output Down, Rapeseed Up

Canada's flaxseed production in 1967 is forecast at 10.3 million bushels—down 53 percent from last year's outturn of 22.0 million. Severe drought reduced flaxseed production to the smallest crop since 1953. Seeded acreage decreased by 42 percent and average yields at 9.3 bushels per acre are 19 percent below 1966. The estimates released on September 1 by the Dominion Bureau of Statistics are based on yields indicated as of August 15.

Production of rapeseed is estimated at 25.6 million bushels, slightly below the record 25.8 million bushels produced in 1966. Acreage increased 13 percent this year but yields per acre are down 12 percent from last year's average of 16.9 bushels.

## Malawi's Flue-Cured Auctions

Sales of 1967-crop Malawi flue-cured tobacco totaled 4.0 million pounds through August 17, at an average price equivalent to 60.5 US cents per pound. In addition, about 823,000 pounds of flue-cured grown in northeastern Zambia were sold at an average of 61.7 US cents.

## Increase in Belgium's Cigarette Taxes

Effective July 1, 1967, the excise tax on cigarettes in Belgium was set at 56.9 percent of the base price for excise valuation. The government has given approval of an increase in producers' prices, which means a rise of 3 to 4.5 francs (6-9 U.S. cents) per pack for cigarettes.

## Smaller Raisin Crop in Iran

The 1967 Iranian raisin pack is estimated at 50,000 short tons, 29 percent below the record 1966 pack of 70,000 tons and below average. A late frost damaged the crop in the important producing areas of Razaiyeh and Maragheh. Other areas report a normal crop.

The Iranian trade expects exports to reach 33,000 tons during the 1967-68 season, about one-fourth less than last season. Incomplete data for 1966-67 indicate that exports may have totaled 44,000 tons. Major export markets during the first half of the 1966-67 season were the USSR, West Germany, East Germany, and the United Kingdom.

## Iranian 1967 Date Crop Estimated Smaller

The Iranian date crop is estimated at 310,000 short tons this year, 3 percent less than the 1966 crop of 320,000 tons and 6 percent below the 5-year 1961-65 average. Heavy winds during June and early July contributed to a smaller crop in Khuzestan, the region where export-quality dates are grown.

Exports during 1967-68 should approach those of last season. Incomplete data for 1966-67 indicate that exports may have totaled 33,000 tons, the highest level since 1958.

Packers report the dates are of excellent quality. They expect to ship about 18,000 tons to Europe, North America, Australia, and New Zealand. Approximately 8,000 tons is destined for the United States.

## Small Dried Apricot Pack Forecast in Iran

Frost damage and heavy rain combined to produce the second consecutive short pack of dried apricots in Iran. The 1967 output is forecast at 3,300 short tons, almost double the 1966 pack of 1,700 tons but considerably below the 5-year 1961-65 average of 10,100 tons.

Exports of dried apricots are expected to reach 2,200 tons during the 1967-68 season, compared with about 1,700 tons in 1966-67 and about 6,600 tons in 1965-66.

## Argentina's Honey Exports Up in 1967

Argentina's honey exports have risen sharply in 1967, following a larger honey harvest in the 1967 season (Dec. 1, 1966-March 31, 1967). Production was believed to be at about the 66-million-pound level this year, compared with 44 million pounds in 1966 when unfavorable weather brought on an unusually short crop.

Exports of honey from Argentina for 1967 may reach 55 million pounds; an estimated 45 million pounds had already been shipped from January through July 1967. During 1966, Argentina exported a total of 34 million pounds of honey.

West Germany was the leading destination for Argentina's honey exports during the first part of this year, accounting for 42 percent of Argentina's honey shipments during January through April, the last month for which country data are available. Other major markets in order of importance were the United Kingdom, Japan, the United States, Ireland, and Italy.

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## Japanese Imports of Selected Agricultural Commodities and U.S. Share

Commodity	Total imports					U.S. share					U.S. position
	Average					Average					as supplier
	1951-55	1956-60	1964	1965	1966	1951-55	1956-60	1964	1965	1966	in 1966
	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Mil. dol.	Rank
Beef and veal .....	0.2	4	4	7	11	(1)	(1)	(1)	(1)	(1)	..
Mutton .....	(1)	1	23	22	39	.....	.....	.....	.....	.....	..
Poultry meat .....	(1)	(1)	4	5	6	.....	.....	4	4	5	1
Nonfat dry milk .....	3	9	14	14	21	2	9	13	12	8	1
Wheat .....	158	164	262	251	279	96	73	120	132	150	1
Rice .....	193	57	58	145	131	42	1	15	43	25	3
Barley .....	63	38	29	41	31	26	14	17	17	18	1
Corn .....	13	47	210	232	243	6	16	101	157	153	1
Grain sorghum .....	1	1	61	88	133	1	1	48	76	118	1
Wheat flour .....	3	6	3	.3	.....	1	4	3	.3	.....	..
Lemons and limes .....	.....	1	5	7	9	.2	1	5	7	9	1
Bananas .....	4	5	55	61	65	.....	.....	.....	.....	.....	..
Almonds .....	.....	.....	3	3	4	.....	.....	3	3	4	1
Raisins .....	1	1	7	6	7	.5	.2	6	5	6	1
Pulses .....	7	11	18	29	25	.....	.....	2	4	2	3
Sugar .....	110	125	249	156	126	.....	.....	.....	.....	.....	..
Wheat bran .....	2	8	19	26	26	.....	2	.....	3	6	2
Alfalfa meal .....	.....	.....	9	13	18	.....	.....	9	13	18	1
Oilseed cake .....	4	1	9	13	13	4	.3	2	7	4	1
Feather meal .....	.....	.....	5	7	6	.....	.....	5	7	5	1
Lard .....	1	3	9	11	11	.4	.3	6	8	8	1
Tobacco .....	9	9	47	45	62	6	8	31	26	46	1
Hides and skins .....	27	33	57	59	98	14	19	34	34	56	1
Soybeans .....	58	94	185	226	272	48	80	154	180	222	1
Oilseeds, other .....	32	57	99	107	139	1	6	22	15	15	(2)
Natural rubber .....	58	99	108	101	110	.....	.....	.....	.....	.....	..
Wool .....	155	226	373	341	417	.....	.....	.....	7	.....	..
Cotton .....	409	398	439	433	414	156	159	142	133	110	2
Tallow, beef .....	17	25	33	42	46	16	21	28	37	40	1
Total.....	1,328.2	1,423	2,397	2,491.3	2,761	420.1	414.8	770	930.3	1,028	..
Total value of all agri. imports....	1,456	1,590	2,786	2,906	3,299	Percent	Percent	Percent	Percent	Percent	Percent
Selected items' portion of total....	91	89	86	86	84	.....	.....	.....	.....	.....	.....
U.S. portion of total.....	.....	.....	.....	.....	.....	30	27	30	34	33	.....

<sup>1</sup>Negligible. <sup>2</sup>First supplier of safflowerseed.